NielsenIQ

Global State of Health & Wellness 2025 Regional Insights Companion: Eastern Europe, Middle East & Africa (EEMEA)

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Featured countries (Eastern Europe)

- Czechia
- Hungary
- Poland

Unless otherwise noted, all data points throughout this report originate from NIQ's 2025 Global Health & Wellness survey.

Overall health and wellness landscape in EE: Trends to watch that are shaping today's industry

Aging population

- Population aging has been apparent for several decades in Europe, driven by historically low fertility rates, increasing life expectancy, and, in some cases, migratory patterns (EU member states characterized by net inflows of retired people).
- By 2050, the population of older people (those aged 65 and up) in the EU-27 will increase significantly, rising from 91 million at the start of 2019 to 130 million by 2050. In particular, the number of people aged 75-84 will increase 56% by 2050, while those under 55 will decrease by 14%.

Health equity

- According to the World Health Organization (WHO) 2019 report covering health equity in Europe:
  - Children and adults from the least-affluent households across the WHO European region continue to report higher levels of poor well-being (measured by life satisfaction) than those from more-affluent households.
  - Life satisfaction in the Caucasus region that spans Eastern Europe and Western Asia is relatively high.

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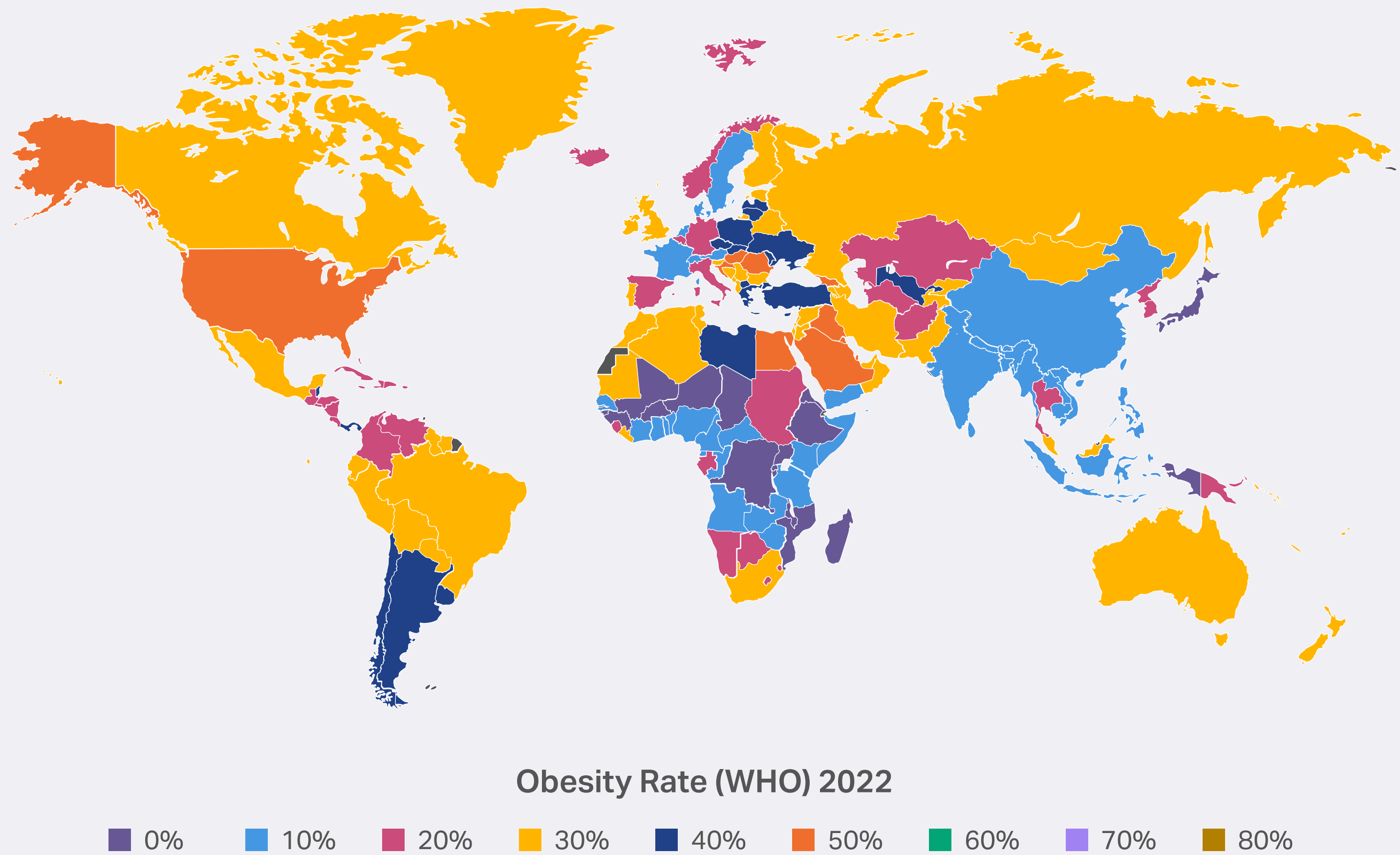
Obesity



Source: The World Health Organization (WHO), Obesity Rates by Country. WHO defines obesity as a body mass index (BMI) greater than or equal to 30 kilograms per square meter of body area (BMI ≥30kg/m²).

Obesity is no longer a phenomenon confined to wealthier parts of the world, such as Western Europe. It is increasingly found in countries within the European region—likely due to an increase in the adoption of Western diets and lifestyles.

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Czechia, Hungary, and Poland health and wellness focus (vs. global benchmarks)

Audience engagement

- Compared with the global average, consumers across Czechia, Hungary, and Poland are slightly less likely than those in other regions to describe themselves as proactive in doing things to improve their health and wellness on a regular basis. Just over half (56%) say they regularly do activities such as exercising, monitoring their health metrics, or watching what they eat (vs. 70% globally).
- Half (52%) plan to do more physical exercise in the coming 12 months, and one-third (34%) plan to take more vitamins/supplements.
- One-quarter (24%) of respondents say seeking out the latest health and wellness products, diets, and routines is more important to them now than it was five years ago.

Barriers

- As with other regions, the cost of healthier alternatives (compared with standard options) is a barrier preventing the greatest number of people from making healthier life choices—standing at 57% across Czechia, Hungary, and Poland. This is slightly above the 54% global average.
- In contrast, fewer people in these countries (24%) complain of difficulty finding healthy alternatives, compared with 31% globally.
- Lack of motivation and lack of time are the next most common barriers, with 24% and 23%, respectively, saying these are major barriers to making healthier choices.

Trust and influence

- Just under one-quarter (23%) say that their lack of trust that health and wellness products will be effective is preventing them from making healthier choices (vs. 25% global average).
- However, 53% still say they are more likely to buy from companies that have a strong health and wellness focus across their entire product portfolio.

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- The top factors that are of *significant* influence when deciding which health and wellness products/services to buy are:
    - Ability to inspect, trial, or sample the product: 42% (This differs from other regions, where a recommendation by a medical health specialist is the leading influence.)
    - Availability of detailed information on a product's use, performance claims, and application: 39%
    - Recommendation by medical health specialists: 37%
    - Ease of returning the product for a refund or exchange: 33%
    - Recommendation by family, friends, or peers: 32%

Mental health and well-being

- Mental and emotional health is growing in importance in Eastern Europe, but overall focus is lower than in most other regions.
- Half (51%) of consumers in Czechia, Hungary, and Poland say looking after emotional/mental health is more important to them now than it was five years ago (vs. 63% global average).
- There are several other factors linked to mental health and well-being that are also more important to them now than five years ago:
    - Getting good sleep: 53% (vs. 63% globally)
    - Health nutrition: 42% (vs. 58% globally)
    - Following a regular self-care routine: 38% (vs. 50% globally)
    - Exercise and cardio fitness: 34% (vs. 52% globally)
    - Looking my best: 29% (vs. 44% globally)
- Within their regular wellness or self-care routines, the top five activities that people in Czechia, Hungary, and Poland plan do more of over the coming year are focused on physical fitness and mental and physical relaxation:
    - Spending more time in nature: 59%
    - Spending time with family/friends: 53%
    - Physical exercise: 52%
    - Taking vitamins or supplements: 34%
    - Massage/muscle relaxation: 31%

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Nutrition

- Compared with other regions, consumers across Czechia, Hungary, and Poland are slightly less focused on enhanced nutrition:
  - 65% say they would pay more for products with enhanced nutritional benefits (compared with standard products), vs. 72% globally
  - 42% say healthy nutrition is more important to them now than it was five years ago (vs. 58% globally)
  - 34% say they plan to take more vitamins/supplements in the coming year (vs. 44% globally)
- Familiarity is strong for animal-derived foods (e.g., meat and dairy), with 60% saying they are "*very* familiar" with these. This is followed by high-fiber foods (52%) and probiotic foods (33%).
- Positive perception of different food types is generally lower than the global average. Nevertheless, 40% hold a "*very* positive" view of high-fiber foods, followed by 32% for probiotic foods and 29% for both animal-derived foods and superfoods.
- The most negatively perceived food type is ultra-processed food, where 36% see this *very* or *somewhat* negatively (vs. 39% global average).
- In terms of the increasing popularity of certain food types, consumers are focusing on buying more of the following in the coming year:
  - High-fiber foods: 39%
  - Probiotic foods: 30%
  - Superfoods: 28%
  - High-protein plant-based foods: 25%

Weight loss

- 42% of consumers across Czechia, Hungary, and Poland say healthy body weight, shape, and muscle tone are more important to them now than they were five years ago (vs. 54% global average); 34% feel the same about exercise and cardio/heart fitness (vs. 52% global average)
- As with most regions, the primary motivator for achieving and maintaining a healthy body weight is for the health benefits it delivers (64% saying this is *very* important), followed by appearance (42%).
- When it comes to weight loss drugs, familiarity with these is much lower in Eastern Europe (18% vs. 37% global average).

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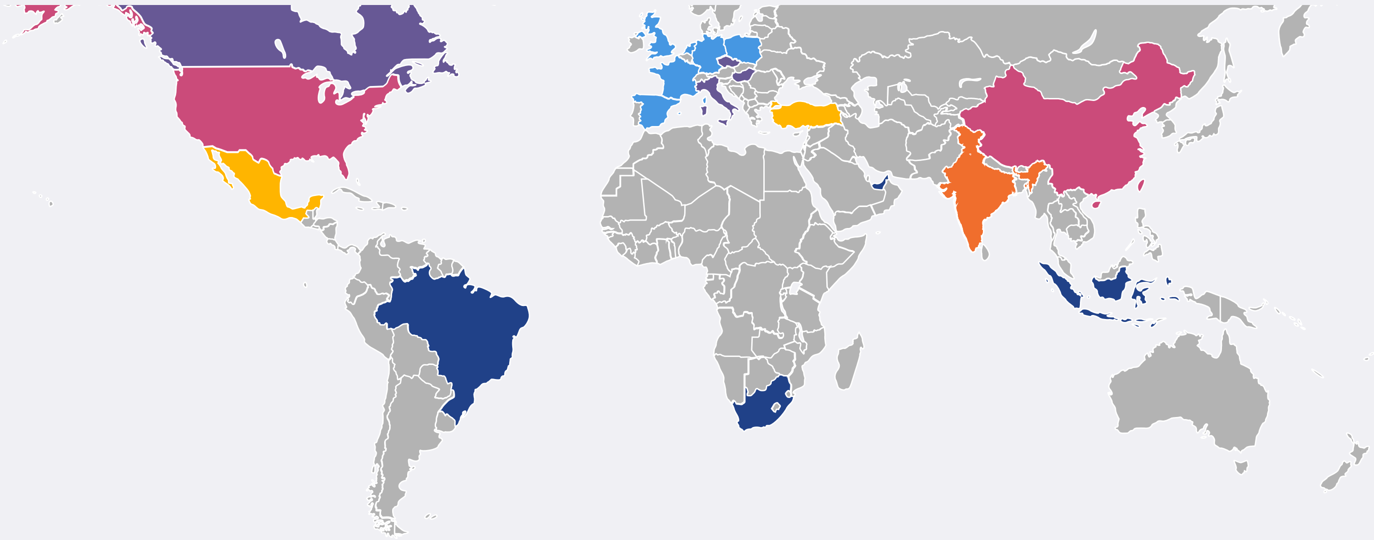
- The majority (53%) have a neutral perception of weight loss drugs, but of the rest, twice as many see these in a negative light (32%) rather than a positive light (15%).
- Only 3% say they are currently using a weight loss drug (vs. 8% global average), although 8% say they've used one in the past (same as the global average).
- Despite that low current usage, willingness to use a weight loss drug in the future, if recommended by a health professional, shows almost equal division between "yes" (32%), "not sure" (33%), and "no" (35%). Those in the "no" category are weighted toward saying "definitely not" rather than "probably not."

Percentage holding "very positive" views of weight loss drugs



26.a) "Very positive" NIQ 2025 Global Health & Wellness survey results

[2% to 5%] [5% to 8%] [8% to 12%] [12% to 17%] [17% to 19%] 32%

Source: NIQ's 2025 Global Health & Wellness survey, fielded Jan.–Feb. 2025, 19 countries
Map visualization is powered by NIQ Partner Network member Mapidea

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Conscious buying

- Familiarity with the concept of conscious buying is slightly lower across Czechia, Hungary, and Poland compared with some other regions, standing at 49% being either *"very"* or *"somewhat"* familiar (vs. 57% globally).
- 55% say it's important to them that the health and wellness products they buy are also ethical and/or environmentally friendly—a significant portion, but lower than the global average (70%)
- Nearly two-thirds (63%) also claim they are willing to pay more for health and wellness products that are also ethical and/or environmentally friendly.
    - Specifically, a core number are willing to pay over 10% more (compared with a standard product) for the following attributes:
        - Cruelty-free or higher animal welfare products: 24%
        - Local source of origin: 22%
        - Organic, non-GMO, and/or natural ingredients: 20%
- The primary motivation for "conscious" buying is personal wellness benefits (62%), followed by environmental sustainability (38%) and supporting local businesses (34%).

Health tech

- Appetite for health-focused technology products is strong across Czechia, Hungary, and Poland, but it's slightly lower than the global average:
    - 69% would prefer a tech product that offered extra health and wellness features over one that did not (vs. 74% global average)
    - 50% believe that health-focused technology products are effective in helping improve their health and wellness (vs. 63% globally)
    - Examples of such products include health tracking in a smartwatch, steam-wash function in a washing machine, low-fat cookers such as air fryers, or products offering more effective air/water filtration, etc.
- Price is more of a consideration than it is in many other regions, with 73% saying that this influences their purchase decision for health tech (vs. 69% globally).
- Consumers' top motivations for buying health tech are:
    - Cooking more healthily: 39%
    - Improving mental health and well-being: 37%
    - Improving sleep quality: 36%
    - Monitoring physical activity: 31%
    - Monitoring diet and nutrition: 23%

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Opportunities for manufacturers and retailers selling in Czechia, Hungary, and Poland

The **top factors that consumers** across Czechia, Hungary, and Poland **say are more important to them now than five years ago are**:

- Getting good sleep: 53%
- Boosting emotional or mental health: 51%
- Having protection from disease, ailments, or medical conditions: 51%
- Aging well: 43%
- Health nutrition: 42%
- Healthy body weight and shape: 42%

Products and services focused on these areas of growing importance to consumers will be well-positioned to capture their increasingly intentional spending. However, **consumer focus on cost remains a key factor**—and is something that the majority see as being up to companies to address.

- 66% across Czechia, Hungary, and Poland believe companies have an obligation to ensure that health-focused products are as affordable and readily available as unhealthy ones
- Six in 10 say that the cost of healthier alternatives to standard products is preventing them from making healthier choices.

What we are seeing is that **products offering personalization and convenience—or that make it easier for consumers to live healthier lives—are likely to drive demand and the opportunity for premiumization**.

- 54% across Czechia, Hungary, and Poland are willing to pay more for health and wellness products that can be tailored to their preferences
- 50% say the same for health and wellness products that offer convenience, such as meal kits, pre-prepared meals, or on-the-go packaging
- 6% would allow a company to access some of their personal health data (e.g., weight, blood pressure, heart rate, average daily steps) to help them make healthier decisions
- 52% want all their personal health tracking statistics to be available to them in a single place—and would favor a brand that enabled that

Health tech is also a growing opportunity, with half (50%) of consumers across Czechia, Hungary, and Poland believing that health-focused technology products are effective in helping improve health and wellness.

- 52% would use a digital device or app that automatically monitors their daily health

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and recommends actions based on health preferences

- 54% say they would pay more for a health or wellness product that can be tailored to their preferences
- 43% would use an app, screening device, or personalized shopping list to ensure the products they purchase align to their health priorities

Consumers continue to place high importance on tracking their health, and there is strong potential for ongoing organic growth in wearables, as the market is not yet saturated. Taking an example from the EU5, 45% of those who bought wearables last year were first-time buyers (Source: NIQ gfknewron Consumer, Core wearables, EU5).

Wearables also have a price point that makes them accessible to a large proportion of consumers—highly relevant in a region where the two common factors that influence people's purchase decision around health tech are price, followed by features and functionality. Brand reputation comes in only fifth. With increasing competition from low-priced and feature-rich emerging brands gaining share in Western markets, this is something that established brands must focus on in their strategic planning and product innovation.

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Overall health and wellness landscape in MEA: Trends to watch that are shaping today's industry

Featured countries (Middle East & Africa):

- South Africa
- Turkey
- UAE

Aging population

- The Middle East & Africa (MEA) region is undergoing significant demographic changes with a rapidly growing older population. Cultural norms surrounding aging in the MEA region are deeply rooted in religious codes, emphasizing intergenerational care and duty roles. These norms place the responsibility for the protection and comfort of older individuals on younger generations.

Health equity

- This region is full of great contrasts, containing some of the richest (measured by income per person) and poorest people. For example, life expectancy in Kuwait (84 years for women, 79 for men) is 25 years longer than in Somalia.
- As in other regions, noncommunicable diseases are a major burden, and coronary heart disease is the leading cause of premature mortality in the region.
- Deaths related to geopolitical conflict are also increasing in certain countries within the region, together with the displacement of people.

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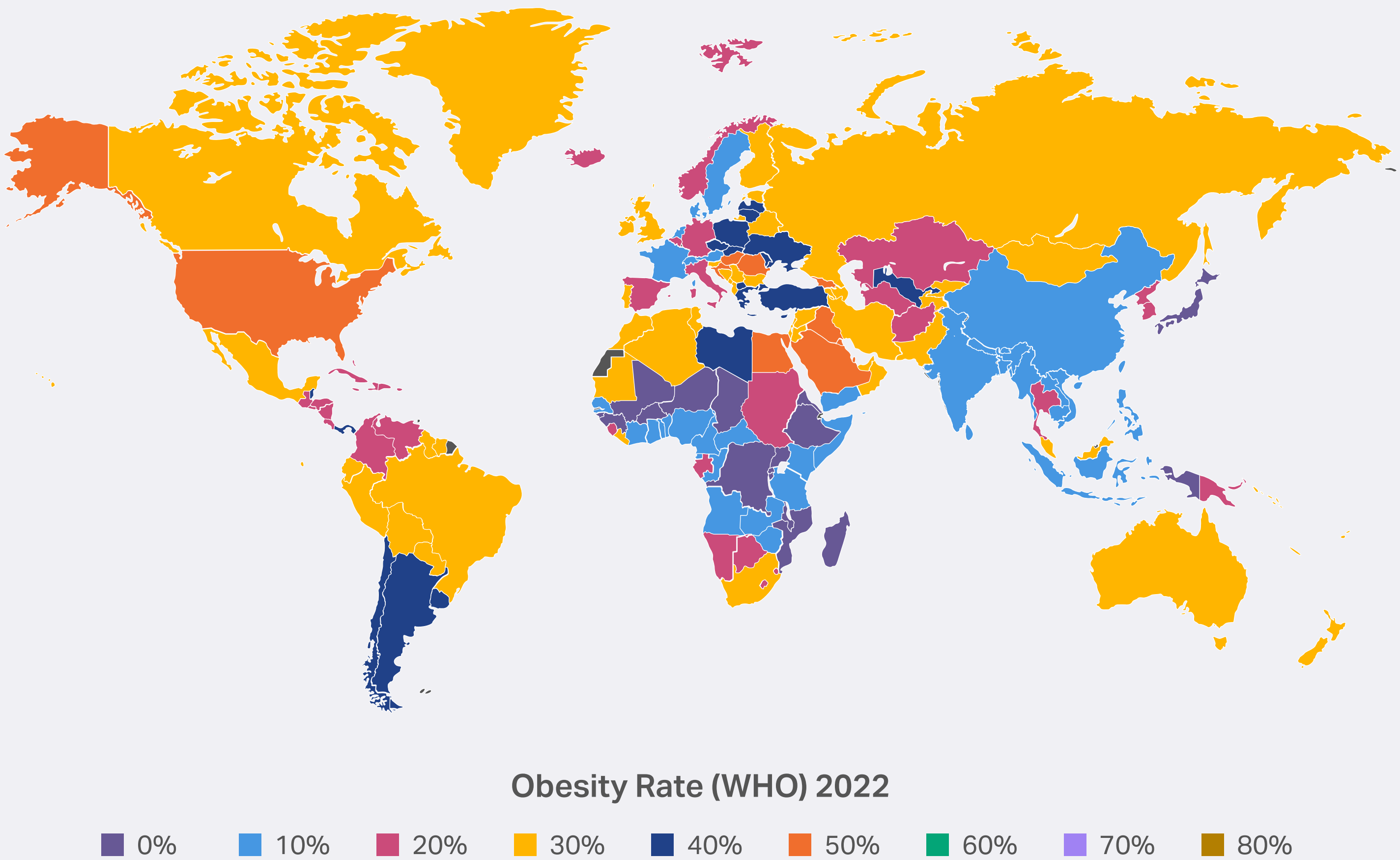
Obesity



Source: The World Health Organization (WHO), Obesity Rates by Country. WHO defines obesity as a body mass index (BMI) greater than or equal to 30 kilograms per square meter of body area (BMI ≥30kg/m²).

The prevalence of obesity and being overweight has been relatively constant in the Middle East over the past two decades. However, obesity levels vary widely across countries within the MEA region—from over 30% in Turkey and the UAE to under 10% in many countries within Africa.

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South Africa, Turkey, and UAE health and wellness focus (vs. global benchmarks)

Audience engagement

- Consumers in South Africa, Turkey, and the UAE are more likely than those in other regions to describe themselves as proactive in doing things to improve their health and wellness on a regular basis.
    - 34% "agree *strongly*" that they regularly do activities such as exercising, monitoring health metrics, or watching what they eat (vs. 28% global average).
    - 39% plan to do "*a lot* more" physical exercise in the coming 12 months (vs. 24% globally), and 26% plan to take "*a lot* more" vitamins or supplements (vs. 16% globally)
    - 56% say seeking out the latest health and wellness products, diets, and routines to meet their evolving health goals is more important to them now than it was five years ago (vs. 39% globally)

Barriers

- Overall, 60% across South Africa, Turkey, and the UAE say the cost of healthier alternatives (compared with standard options) is preventing them from making healthier choices. This is higher than the 54% global average—and driven primarily by South Africa and Turkey.
- After cost, the next most common barriers are:
    - Difficulty finding healthy alternatives: 40% (vs. 31% globally)
    - Lack of trust that the product will be effective: 32% (vs. 25% globally)
    - Lack of motivation: 28% (vs. 25% globally)
    - Lack of time: 26% (same as the global average)

Trust and influence

- Lack of trust that health and wellness products will be effective is a major issue across South Africa, Turkey, and the UAE, with 32% saying this is preventing them from making healthier life choices—much higher than the global average of 25%.

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- However, 43% "*strongly* agree" they are more likely to buy from companies that have a strong health and wellness focus across their entire product portfolio (vs. 29% globally).
- The top factors that are of *significant* influence when deciding which health and wellness products/services to buy are:
    - Recommendation by medical health specialists: 64%
    - Availability of detailed information on its usage, performance claims, and application: 55%
    - Ability to ask questions and get expert advice from sales or medical representative: 54%

Mental health and well-being

- Supporting mental and emotional health is a key issue across South Africa, Turkey, and the UAE, with 76% of consumers saying this is more important to them now than it was five years ago—significantly higher than the global average of 63%.
    - This puts mental health on par with protection from disease and medical conditions, in terms of the percentage of consumers saying each is of increased importance to them.
- Additionally, most consumers in these countries are placing greater importance now than previously on other wellness factors that have direct correlation with supporting good mental health:
    - Getting good sleep: 72%
    - Exercise and cardio fitness: 65%
    - Following a regular self-care routine: 65%
    - Looking their best: 63%
- When it comes to their regular wellness or self-care routines, the leading activities that people plan to do "*a lot* more" of in the coming year are:
    - Spending time with family/friends: 43%
    - Physical exercise: 39%
    - Spending more time in nature: 36%
    - Taking vitamins or supplements: 26%
    - Massage/muscle relaxation: 24%

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Nutrition

- Nutrition is also a key topic across these countries: 70% say healthy nutrition is more important to them now than it was five years ago (vs. 58% global average), and 26% plan to take "*a lot* more" vitamins/supplements in the coming 12 months (vs. 16% global average).
- Familiarity across all the different food types is higher across South Africa, Turkey, and the UAE compared with other regions. It's highest for animal-derived foods and high-fiber foods (both with 61% saying they are "*very* familiar" with these), followed by superfoods (48%).
- Positive perception is also higher across the region for all food types, compared with other regions. In particular, the leading food types that have "*very* positive" perception across these countries are:
    - High-fiber foods: 59% (vs. 49% global average)
    - Superfoods: 51% (vs. 38% global average)
    - High-protein plant-based foods: 47% (vs. 35% global average)
    - Probiotic foods: 46% (vs. 34% global average)
- When it comes to future buying intentions, the foods that most people plan to buy "*a lot* more" of in the coming year are:
    - High-fiber foods: 33%
    - Superfoods: 26%
    - High-protein plant-based foods: 23%
    - Probiotic foods: 23%
    - Animal-derived foods (e.g., meat, dairy): 19%

Weight loss

- 68% say healthy body weight, shape, and muscle tone are more important to them now than they were five years ago, and 65% feel the same about exercise and cardio or heart fitness
- Consumers' primary motivations for achieving and maintaining a healthy body weight are:
    - Health benefits it brings: 79% say this is a *very* important motivation
    - Appearance: 62%
        - Note: Both of these are higher than their respective global averages.

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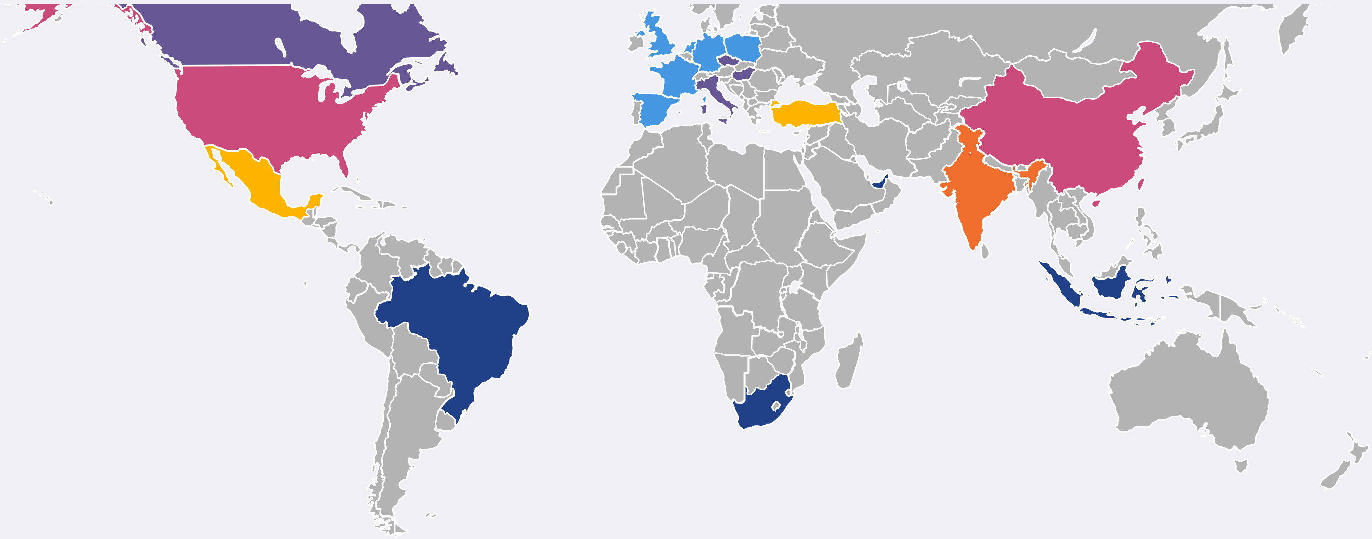
- When it comes to weight loss drugs, both familiarity and positive perception are higher here than in other regions.
    - 45% of respondents say they have a level of familiarity with weight loss drugs (vs. 37% global average)
    - 40% hold a positive perception of weight loss drugs (vs. 31% globally)
    - Only 16% have a negative view of them (vs. 23% globally).
- Usage of such drugs is on par with the global average, with 8% of MEA respondents saying they are currently using a weight loss drug and 7% saying they have done so in the past.
- Nearly half (49%) say they would be willing to use a weight loss drug in the future, if recommended by a health professional—this is higher than the global average (43%).
    - By comparison, fewer than one-quarter (23%) say they would not use such drugs (vs. 30% globally).

Percentage holding "very positive" views of weight loss drugs



26.a) "Very positive" NIQ 2025 Global Health & Wellness survey results

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Source: NIQ's 2025 Global Health & Wellness survey, fielded Jan.–Feb. 2025, 19 countries
Map visualization is powered by NIQ Partner Network member Mapidea

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Conscious buying

- Overall, consumers across South Africa, Turkey, and the UAE are more likely to be familiar with and *strongly* support conscious buying.
    - 32% say they are "*very* familiar" with the concept (vs. 22% global average)
    - 43% say it's "*very* important" that the health and wellness products they buy are also ethical and/or environmentally friendly (vs. 29% global average)
- 80% also claim they are willing to pay more for health and wellness products that are also ethical and/or environmentally friendly—again, putting them ahead of the global average (71%)
    - Specifically, key portions of consumers in these countries expressed a willingness to pay over 10% more than they would for a standard product for ones that were also:
        - Organic, non-GMO, and/or made from all-natural ingredients: 48%
        - Sourced locally: 40%
        - Socially responsible (e.g., supports communities, vulnerable populations, charities): 40%
        - Cruelty-free or higher animal welfare: 38%
        - Produced or packaged in an environmentally friendly way: 38%
- The primary motivation for "conscious" buying within health and wellness purchases is personal wellness benefits (76%), followed by environmental sustainability (57%) and ethical considerations (45%).

Health tech

- Appetite for health-focused technology products is particularly high across South Africa, Turkey, and the UAE as a whole.
    - 76% believe that health-focused technology products are effective in helping improve health and wellness (vs. 63% globally)
    - 45% say they would "*definitely*" prefer a technology product that offered extra health and wellness features over one that did not
        - This is notably higher than the global average of 31%, making this a key opportunity in the region.
        - An additional 39% would also prefer such tech, "depending on price."
        - Examples of these products include health tracking in a smartwatch, steam-wash function in a washing machine, low-fat cookers such as air fryers, and products with more effective air/water filtration, etc.

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- As with other regions, price is still the leading factor that most people say influences their purchase decision for health tech—but at 66%, this is lower than the global average. Features and functionality are the next most common influence on choice, at 63% (vs. 60% global average). However, brand reputation is notably more important here than in other regions: 51% say it influences their health tech purchase decision (vs. 39% globally).
- Consumers' top motivations for buying health tech are:
  - Cooking more healthily: 53%
  - Improving mental health and well-being: 52%
  - Monitoring physical activity: 49%
  - Improving sleep quality: 47%
  - Monitoring diet and nutrition: 46%

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Opportunities for manufacturers and retailers selling in South Africa, Turkey, and UAE

Consumers across South Africa, Turkey, and the UAE show a **high appetite for health and wellness products that support good mental health and well-being and healthier nutrition**.

The top factors that consumers in these countries say are more important to them now than five years ago are:

- Emotional and mental health: 76%
- Protection from disease, ailments, and medical conditions: 75%
- Getting good sleep: 72%
- Having a hygienic or germ-free environment (e.g., personal cleanliness, antibacterial products): 72%
- Health nutrition: 70%

In addition, **manufacturers and retailers can differentiate themselves on factors including personalization and conscious buying**, which are particularly important to MEA consumers.

- 76% say they would use a digital device or app that automatically monitors daily health and recommends actions based on their health preferences
- 42% would pay over 10% more for health and wellness products that can be tailored to their preferences (e.g., meal kits, diet plans, supplements) vs. 27% global average
- 43% say that it's "*very* important" that the health and wellness products they buy are also ethical and/or environmentally friendly (vs. 29% global average)

Trust is an important area of both challenge and opportunity. While the levels of mistrust are higher here than in other regions, there is a much stronger tendency for consumers to buy from companies that have a strong health and wellness focus across their entire product portfolio. In addition, companies are well-advised to invest in developing consumer trust by focusing on:

- Gaining endorsements from medical health specialists
- Providing readily accessible and detailed information on product usage, performance claims, and application
- Providing point-of-sale access to knowledgeable teams, where consumers can get expert advice—both online and in-store

Health tech is a big opportunity in MEA, with future buying intentions focused on tracking personal health metrics and battling air and water pollution, as well as relaxation.

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- Three in 10 plan to buy wearables, an air purifier, or a water filter in the next 12 months.
- One-quarter plan to buy personal diagnostics (e.g., blood pressure monitor, blood sugar monitor, digital thermometer).
- One-quarter plan to buy electrical massager/electrical muscle stimulation products.

Among higher-income consumers, opportunity lies in higher-end health tech products with integrated AI that can provide personalized recommendations based on individuals' personal health metrics and objectives. Among lower-income consumers, health tech should focus on basic models that support consumers in areas such as healthier cooking, tackling air and water pollution, and tracking core health metrics and diet.

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About NIQ

NielsenIQ (NIQ) is a leading consumer intelligence company, delivering the most complete understanding of consumer buying behavior and revealing new pathways to growth. NIQ combined with GfK in 2023, bringing together two industry leaders with unparalleled global reach. Our global reach spans over 90 countries covering approximately 85% of the world's population and more than $7.2 trillion in global consumer spend. With a holistic retail read and the most comprehensive consumer insights—delivered with advanced analytics through state-of-the-art platforms—NIQ delivers the Full View™.

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